

Title: Understandings about the interrelationship of gender inequality, poverty and education, and gender-based strategies to reduce poverty: Some findings from two case studies in the South African education sector

Citation: Karlsson, J. (2009) Understandings about the interrelationship of gender inequality, poverty and education, and gender-based strategies to reduce poverty: Some findings from two case studies in the South African education sector. *Agenda* 23 (81), pp. 71-79. DOI: 10.1080/10130950.2009.9676255

Official URL: <http://dx.doi.org/10.1080/10130950.2009.9676255>

More details/abstract: How do role players in the education sector in South Africa understand the interrelationship between gender equality, poverty and education, and what strategies are pursued to reduce poverty? In this Focus I explore these questions by drawing on data from school and provincial education department case studies in South Africa that were conducted in 2008 and 2009 respectively. The findings are that education managers and gender advocates do see an interrelationship between poverty and gender inequality and it manifests as three deficits: educational, macro-economic and professional. I found that individuals and households and the bureaucracy pursue a range of strategies, related to gender, which are aimed at reducing poverty. However, the individual and household strategies lead to teen pregnancy that interrupts girls' schooling. One of the Department's strategies seeks to obviate that interruption by requiring girls to return and continue their studies, while another seeks to organise and empower women economically by establishing women's cooperatives that service school feeding schemes. In the conclusion I point to several serious concerns that arise from these strategies.

Version: Accepted version

Terms of use: This is an Accepted Manuscript of an article published by Taylor & Francis in *Agenda* on 3rd May 2011 available online at: <http://dx.doi.org/10.1080/10130950.2009.9676255>

This is a download from OpenDocs at the Institute of Development Studies

Understandings about the interrelationship of gender inequality, poverty and education, and gender-based strategies to reduce poverty: Some findings from two case studies in the South African education sector

Jenni Karlsson

abstract

How do role players in the education sector in South Africa understand the interrelationship between gender equality, poverty and education, and what strategies are pursued to reduce poverty? In this *Focus* I explore these questions by drawing on data from school and provincial education department case studies in South Africa that were conducted in 2008 and 2009, respectively. The findings are that education managers and gender advocates do see an interrelationship between poverty and gender inequality and it manifests as three deficits: educational, macro-economic and professional. I found that individuals and households and the bureaucracy pursue a range of strategies, related to gender, which are aimed at reducing poverty. However, the individual and household strategies lead to teen pregnancy that interrupts girls' schooling. One of the Department's strategies seeks to obviate that interruption by requiring girls to return and continue their studies, while another seeks to organise and empower women economically by establishing women's co-operatives that service school feeding schemes. In the conclusion I point to several serious concerns that arise from these strategies.

keywords

schooling; women's co-operatives; teen pregnancy; traditional customs; school nutrition

Introduction

Since the 1970s women have been pushed to be participants in development initiatives that are aimed at reducing poverty. This was driven

by an understanding that there is a fundamental connection between patriarchy and under-development (Kabeer, 1994). However, merely involving women as participants in development

projects fails to address patriarchy systemically in terms of unequal power relations between men and women. For example, societies continued to structure subordinate social positions for women and give men advantages and access to opportunities and resources that were not made available in the same way to women. Thus, by the end of the 20th century gender inequality was exposed internationally as a critical component of poverty and this is expressed in the global mandates of the Millennium Development Goals, which make education an important site where these interconnected problems play out and so should be addressed there (United Nations, 2000). Despite this recognition in international forums, it is not clear how role players in the education sector understand the interrelationship between gender equality, poverty and education, nor have researchers illuminated what role players are doing about it.

It is not clear how role players in the education sector understand the interrelationship between gender equality, poverty and education

In this *Focus* I explore role players' understandings of this interrelationship and gender-based strategies meant to ameliorate poverty. The data is drawn from the South African component of an international study about gender and poverty reduction initiatives at the global level and in the education systems of Kenya and South Africa.¹ In particular, this South African data is from two organisational case studies, namely a school and a provincial education department, that were conducted in 2008 and 2009 respectively. These sub-national case studies were both located in the province of KwaZulu-Natal. This province was selected on the basis of having the largest education system, comprising almost 2.8 million learners enrolled at 5 950 public schools and taught by almost 87 000 teachers (KwaZulu-Natal Department of Education, 2009b:1). KwaZulu-

Natal is also distinguished by several challenges: it is one of the poorest provinces in South Africa and it has a large rural population, with about 80% of the population speaking isiZulu as their home language. The school was selected on the basis that it is a primary school on the periphery of the largest city in the province and located in a poor working class neighbourhood.

Methodological considerations

For the school and provincial education department case studies several qualitative methods were used to generate data. Key participants were trailed in order to know the everyday routines and practices of the institution or organisation. The trailing method entailed spending an extended period of time observing the participant, sitting in their office space, making notes about their workplace, how it is populated with organisational materials and cultural artefacts and thereby given a character that may align with the identity and gender of the participant. Trailing also entailed moving with the participant over the duration of the observation, and seeing how their office stands in relation to other significant places of the institution or bureaucracy, such as the entrance and other senior managers' offices. Detailed notes were made about the participants' activities, their reading matter, who interacts with them, and the subject and mode of interaction.

In-depth interviews were conducted with key people. These interviews sought to generate data about their understandings of the interrelationship between poverty, gender and education.

Focus group interviews were also conducted with various stakeholders and role players. The discussion was around fictitious but realistic scenarios such as how a school dealt with the issue of a teen pregnancy and what might be done with a windfall of funds earmarked for girls' education. These discussions served to illuminate participants' attitudes and understandings of gender-related issues as well as decision-making

dynamics within the group of men and women participants.

Observations of meetings were also conducted. This method entailed noting who attended meetings, how they engaged in discussion and debate, and the gender power relations of decision-making. Documents and reports received at such meetings as well as from participants were collected and subjected to content analysis.

Hence the case studies of the school and Provincial Education Department have elements of an ethnographic approach in that during time in the field I established "considerable rapport" (Angrosino, 2008:165) with the communities and groups that I was observing. Although the province of KwaZulu-Natal is identified in writing about the study, I assured participants and the school that their names would not be used. This assurance was intended to encourage participants to speak freely in my presence and also to protect them from censure from their line managers and peers, as well as any other unanticipated risks. No children were participants in the first round of data generation during 2008 and 2009.²

The data used in this *Focus* is primarily from the in-depth interviews in which I asked participants about the major gender and poverty issues that arise in their work. Their 'talk' was analysed archaeologically (Scheurich, 1997; Scheurich & McKenzie, 2008). By this I mean that I looked at the words participants used to refer to gender equality, poverty and education, and I sought to uncover how their usage illuminated any interrelationship of the concepts and the unequal structuring of social relations.

Findings

In this section I have organised the findings of how key participants at the school and Provincial Education Department see the interrelationship between poverty and gender inequality in terms of three deficits: educational, professional, and macro-economic. Then I discuss strategies relating

to gender that individuals and households initiate and that the bureaucracy pursues to reduce poverty. These strategies operate within the education sphere.

The interrelationship between poverty and gender inequality

In this study the participants interviewed at school, district and provincial levels were unanimous that there is a link between poverty and gender inequality. Paraphrasing well-known slogans, one Gender Focal person said:

...they say 'You educate a woman, you educate the nation. If you empower women, you empower the nation'. I would say there is a direct link with gender per se and poverty.

My analysis of the data found that the link is constructed as a need or deficit in people's lives. These deficits were emphasised differently by each of the interviewees and I have clustered these into three categories of an educational deficit, a professional deficit, and/or a macro-economic deficit in the lives of women.

i) The educational deficit

Some interviewees understood the poverty-gender inequality connection in terms of a basic education deficit in that there is a high prevalence of illiteracy among poor women. This is despite the fact that in South Africa the Constitution safeguards rights to education and education laws make enrolment and attendance compulsory during general education and training (Grades 1 to 9). In addition, schools serving the poorest communities are prohibited from charging school fees and most of these schools serve a daily free meal to learners. Nevertheless, interviewees spoke about the problem of illiteracy among poor women because as teenagers these women are often pressed by their poverty or oppressive sexual practices and then they fall pregnant and drop out.

A district Gender Focal Person explained:

...gender-based violence [is] complicating the issue of poverty and translating into illiteracy because it leads to early school drop out when the girl child has to take care of the baby without the support of the father.

One provincial manager clarified how teen pregnancy and dropping out are triggered by poverty and gender relations:

...in spite of all the education that we have in the schools, the community, by the health department, by whoever actually, and the church is involved, but we still have a very high learner pregnancy rate in the province and it's- from the figures that we have, it's clear that the poorer or the more rural and the poorer the area is, the more pregnancies you get. And in most cases those girls are not being impregnated by school boys their own age; it's usually older men who are working and that's the sad part for me and that really is an issue because it means they are denied the education...

These participant accounts do not merely illuminate the connection between poverty and gender inequality. They flag illiteracy as a key indicator of the effect that when poverty and gender inequality work in concert in the life of a teenage girl, if she falls pregnant and disrupts her schooling and process of becoming 'literate', this can push her into a cycle of perpetuated poverty over her lifetime. Illiteracy is their codified generic term for the educational deficit that is rendered by poverty and gender inequality.

ii) The professional deficit

The connection between poverty and gender inequality emerges in the education workplace as prejudice that detrimentally affects women's

career prospects. Here I refer to this as a professional deficit because women are denied opportunities in the workplace on the basis of their alleged lack of skills and experience. One participant contended:

Women are marginalised. You find that senior managers, male ones, don't have trust in women. The task that can be done by a female is always given to a male, especially when you look at acting [temporary] positions. Women are not allowed to act. A senior manager can prefer to act in both places rather than to put somebody who really qualifies. They don't care about experience.

This account illuminates how entrenched notions about gender inequality shape a perception that women lack the professional acumen for senior appointments and this informs decision-making that then obstructs women's promotion prospects. Although South Africa has promulgated employment equity legislation (Republic of South Africa, 1998) and government sets employment equity goals and monitors progress towards them (for example, see KwaZulu-Natal Department of Education, 2009a), this participant's understanding points to a different experience that is of discriminatory attitudes and gendered relations, which negate women's advancement in the education bureaucracy.

iii) The macro-economic deficit

Other interviewees understand poverty and gender inequality as a deficit in the macro-economic arena. This perspective was expressed by one interviewee as being based on the idea that women should have "accessibility [and] equal sharing in the economy". However, this interviewee noted that "a high level of women are unemployed". Participants reported that the education authorities recognise this deficit by saying that women's entrepreneurial initiatives need to be supported in government's

procurement of service providers. As a result the Provincial Education Department has initiated a strategy involving women's co-operatives, which I discuss more fully below.

Strategies to ameliorate poverty and gender inequality

In my analysis of interviewee accounts I found mention of strategies that seek to interrupt and ameliorate the effect of economic poverty and gender inequality. They are strategies pursued by individuals and their families or they are organisational strategies that are implemented by the Provincial Education Department.

i) Strategies of individuals and households

In one of the interview quotations presented above, it is evident that some poor school girls use transactional sex as a strategy to offset their immediate poverty circumstances. Transactional sex refers to sexual relationships that cut across generations or age groups and that involve the giving of gifts or services (Luke and Kurz, 2002; Swidler and Watkins, 2006). The relationship is distinguished from prostitution in that transactional sex does not constitute the sole livelihood of the person providing the sex. Luke and Kurz (2002) assert that transactional sex in Africa is customarily between spouses but increasingly is evident as a phenomenon between older men and adolescent girls. Swidler and Watkins (2006:2) concur and point out that:

a transactional element is a feature of most sexual relationships in many regions of sub-Saharan Africa, from marriages, to long-term non- or extra-marital partnerships, to short term relationships.

Transactional sex is an important gender issue because of the power asymmetry that is explicit in the transaction. Indeed, in an era of AIDS the relative inexperience of young girls and their limited access to information are a disadvantage

that may have disastrous consequences when compared to that of the older men in such transactional behaviour.

Transaction sex emerges in one interviewee's account as quoted in (i) p 74 above. She referred to school girls who strike up 'affairs with older men'. Later she asserted that this was in order to generate money and 'material benefits' from 'sugar daddies'. Such transactional relationships were said by interviewees to be a more common strategy in urban than rural areas and constitute a form of child trafficking that is supported and encouraged by the authority figures in their poverty-stricken household. A provincial gender advocate spoke of workshops and dialogues where:

...some of [the girl learners] would come out in the open and say it's their parents pressing on them to have babies so that the entire family could receive something to eat, you know. So they are pushed into prostituting...

The interviewee disclosed that men participating in such illicit sexual relationships may even be education professionals employed by government in the education system:

We've got cases of school principals, school teachers, impregnating girl learners, and all the parents can say is that he buys us food.

A variation on this strategy to mitigate poverty is the assertion that teen pregnancy is a ploy often used to leverage a social grant from the state. Using hyperbole to drive home her point about the attractiveness of a few hundred Rand per month as the Child Support Grant to a teen girl living in dire poverty, one interviewee contended that:

Some girl learners feel that it's kind of like here's a child, here is your reward. And then you can live a luxurious life and buy yourself cell phones...

Asymmetric relations that characterise transactional sex can take a different form for poor girls living in deep rural areas where traditional customs remain strong. The interviewee explained:

...we are the province that still practises a lot of polygamy with traditional churches like Shembe legalising that in a way. We still have cases, minimal as they are, of girl learners being taken away.

This suggests that transactional sex strategies may be closely associated with some traditional marriage practices, and may even be given the nod from the local community. One traditional leader has disputed this perspective and asserts that:

*the great majority of traditional communities and leaders do not encourage the customary practice of ukuthwala (forced marriage) for the conclusion of marriage (Bantu Holomisa, 'The need to return to traditional family values', *The Mercury*, 16th November, 2009).*

The importance here is not whether these practices are encouraged or not, but to understand the negative impact that such strategies have on a girl's education and life. This dimension is explained by another provincial manager:

...there is a cultural practice that if a girl has fallen in love, then the girl, let's say the girl falls in love with an 18 year old boy, the girl is 14 or 15 and what is worrying is that the girls who are falling in love in terms of age are getting younger and younger. There is a practice... of ukuthwala [literally to be carried off; a custom of forced eloping for marriage purposes]. Once you are known you have fallen in love then you are taken to the boy's home, whatever good – I don't know what goes between the two families but the girl actually stays there

for two or more weeks at the boy's place. You are unofficial makoti [bride], you haven't been labola'ed [the bride-price transaction] but you are just saying 'I am here for this man' and in the process as a young girl you not going to school. By the time you get back to school you have lost two or three weeks of school time and how do you cover that up? And yet the boy continues to go to school. Let's say it's not even a boy but even an older man. That older man, once you have stayed there, you are at his beck and call and if you are a learner and what does that do to you in terms of – it may be somebody that is in Joburg but it means every time he is around whether for the weekend or on holiday, then you are at his place, that does affect the learner's attendance and therefore progress at school. So it's cultural...

Although such cultural practices may be associated in some communities with an anti-poverty strategy to consolidate or generate wealth between families, their effect of interrupting or discontinuing the girl's schooling fails to break her away from the cycle of inter-generational poverty among rural women.

ii) Strategies of the bureaucracy

During interviews I found evidence of two quite different government interventions that endeavour to break the grip of poverty and gender inequality in the education sector. The first is a policy initiative of the national Department of Education for the retention of post-pregnancy girls, which is implemented within provinces.

This strategy is a national programme. Therefore the Provincial Education Department follows the national *Measures on the Prevention and Management of Learner Pregnancies* (Department of Education, 2007). In explaining how the Department holds district and school-based workshops with girl learners to discuss

their gender concerns, a gender focal person clarified that it is critical for families that poor school girls return to their studies after giving birth. She said:

...to retain them [in school] is to break the inter-generational poverty in terms of when you're educated things are going to start happening. You might be the pioneer in your family that would give a breakthrough in terms of others being educated because you were educated.

Despite the national policy position and there being departmental officers who support the return of girls to their studies after their pregnancies, it is not easy for such girls when or if they return. Many school principals and governing body members continue to hold conservative views and frown on the retention of these girls in the schooling system. For example, one principal has described his primary school as being 'lucky' when a pregnant girl stopped attending school and at the start of the following year requested transfer to another school. He said that "the parent reported that the child didn't want to be the laughing stock of the school".

The second is the establishment of women's co-operatives to provide supplies and services to the schools that provide poor learners with a daily free meal. A provincial gender focal person explained that the former education minister at provincial education level, co-incidentally a woman, initiated this strategy. In an interview she said the MEC (Member of the Executive Committee) "put her muscle into it, into seeing that women are given their bit in the development". A senior manager described how this strategy works:

...we have introduced local women cooperatives and women have come together to form a group. Then we use them in the Nutrition Programme as service providers in

the schools. So that [the women] are not only parents, they are actually providing a service and have become business people.

...The funding for training for the cooperatives comes from the Department of Economic Development. They are then trained by the FET colleges in the Department of Education and once they are trained – there is oral training and practical training – they are then used by the National Schools Nutrition Programme as service providers. ...in 2006 August there were 42 of them. These are circuit-based cooperatives. ...They're just women from poor social economic backgrounds with no business acumen. We've had to nurture them, train them, have workshops with them, take them all steps of the way to become business people. What the Department does is it allocates certain schools to cooperatives and those schools may not be competed for by [small, medium and micro enterprise. ... Schools will order in from the service providers... They will then provide the dry ingredients. The food will be cooked at school and once they have delivered the service they then submit claims to the Department. Then the Department from the provincial office pays them directly.

What is commendable about this strategy is the chain of multiple beneficiaries. As poor women develop their skills, they become collective entrepreneurs and thereby generate income for their families and dependants. In so doing, they partner with local schools to better feed poor children so that these children will attend school regularly and have better concentration levels and academic outcomes from their lessons. Unfortunately this strategy has only been through a pilot phase and many more women's co-operatives are necessary for the large number of schools in the School Nutrition Programme.

A second concern is that the women's

co-operatives face competition from men who run small businesses that provide the same supplies and services to schools. The senior manager said that school principals fan their anxieties and make the women feel that they must 'plough back' and give 'favours' by leaving generous supplies at the school or face the prospect of losing the school's custom. Until school principals receive training in gender mainstreaming and better understand that gender inequality goes beyond achieving parity, as Subrahmanian (2005) and Unterhalter *et al* (2009) have noted, such iniquities will persist.

Conclusion

To conclude, what I have argued in this *Focus* is that the interrelationship between poverty, gender inequality and education is complex. Based on my research, I have found that education officers do recognise that gender and poverty are connected even though they have varying interpretations of how gender and poverty are linked and play off each other in the education context. I sought to show some of the nuances in their understandings. It is important to go beyond understandings of the conundrum and consider how people and government seek to ameliorate poverty and the gender dimension of their strategies.

In terms of the strategies that I have identified, there are a number of issues that are a cause for alarm. First, there is the emergence of a form of child trafficking by way of poor households becoming dependent on a school girl's transactional sex relationships. Second, the tradition of forced marriage involving school girls continues to occur, despite traditional leaders' claims to the contrary. In the case of the forced marriage practice the education rights of poor girls are being stacked up against traditionalism. In such situations it is important for the State and education authorities unambiguously to support the rights discourse and serve the long-term interests of girls who will live out their adult lives in an increasingly global and complex community.

The third concern is the assertion that girls are exploiting the South African government's social grants for children, though social scientists are not finding convincing evidence of this claim (see Lund, 2008; Makiwane & Udjo, 2007). Nevertheless, provincial education authorities are noting teen pregnancy as a growing problem (KwaZulu-Natal Department of Education, 2006). Teen pregnancy interrupts girls' schooling and jeopardises their future career prospects. For poor girls teen pregnancy poses a serious threat to their education and the prospect of them assisting to improve the living conditions of their families in the future. This particular concern of teen pregnancy, especially among poor girls, requires teachers and the school authorities to work in partnership with other arms of government such as the school health officers, primary health clinics and local communities. The South African education authorities have developed guidelines for dealing with teen pregnancies in a school context (Department of Education, 2007) and school managers, teachers, support staff and governing body members need to be familiar with these and understand how best to serve the pregnant and post-pregnant girl's educational and personal needs. Life Orientation lessons are also an important locus for teachers to facilitate discussions about sexuality, gender inequalities and power relations with the boy and girl learners in their classes.

The fourth concern about strategies is in relation to the women's co-operatives that service schools and the reports of petty corruption and greed among school managers that unfairly pit women's co-operatives against male entrepreneurs. This undermines the Department's initiative that has as one of its aims to break the cycle of poverty among rural women. Senior government managers who have information about such incidences should act decisively to protect the integrity of this strategy which is still in its infancy and guard the interests of rural women who may lack experience and access to information.

The discussion above underlines the importance of having insight into how various role players understand the interrelationship of gender inequality, poverty and education as a social problem. I have suggested several ways to address four key points of concern that arise in the strategies I found. These ideas pursue different avenues involving diverse social actors. This is appropriate given the complexity of the education sector, the deeply entrenched gender inequalities in society and the different forms of poverty that push more and more girls, women and their families into desperation, dependency and indebtedness.

Footnotes

1. This paper is based on research conducted for the ESRC funded project 'Gender, education and global poverty reduction initiatives' (Award number RES-167-25-0260), led by Professor Elaine Unterhalter of the Institute of Education, University of London, UK. The component of this research conducted under the auspices of the University of KwaZulu-Natal carries an ethical clearance certificate.
2. It is planned for children to be participants in the second round of data generation. An ethical clearance application for such participation is under consideration by the University of KwaZulu-Natal.

References

- Angrosino MV (2008) 'Recontextualising observation: ethnography, pedagogy, and the prospects for a progressive political agenda', in NK Denzin & YS Lincoln (eds) *Collecting and Interpreting Qualitative Materials*, London: Sage Publications.
- Department of Education (2007). *Measures on the Prevention and Management of Learner Pregnancies*, Pretoria: Department of Education.
- Kabeer N (1994) *Reversed Realities: Gender Hierarchies in Development Thought*, London: Verso.
- KwaZulu-Natal Department of Education (2006) Teenage pregnancy summit. Available from <http://www.info.gov.za/speeches/2006/06102314451002.htm> (Retrieved 25 October, 2006).
- KwaZulu-Natal Department of Education (2009a) 'Final draft: Reviewed employment equity plan: KZN DoE', Unpublished.
- KwaZulu-Natal Department of Education (2009b) 'Snap survey for ordinary schools 2009 report', Available from <http://www.kzneducation.gov.za/directorates/emis/2009/SNAPREPORT2009final.pdf> (Retrieved 10 September 2009)
- Luke N & Kurz KM (2002) *Cross-generational and Transactional Sexual Relations in Sub Saharan Africa: Prevalence of Behavior and Implications for Negotiating Safer Sexual Practices*, Washington, DC: International Center for Research on Women.
- Lund F (2008) *Changing Social Policy: The Child Support Grant in South Africa*, Cape Town: HSRC Press.
- Makiwane M & Udjo E (2007) 'No proof of 'child farming' in awarding of Child Support Grants', in *HSRC Review*, 5,(01):6-7.
- Republic of South Africa (1998) *Employment Equity Act*, No 55, Pretoria: Government Printer.
- Scheurich JJ (1997) *Research Method in the Postmodern*, London: Falmer Press.
- Scheurich JJ & McKenzie KB (2008) 'Foucault's methodologies: archaeology and genealogy', in NK Denzin & YS Lincoln (eds), *Collecting and Interpreting Qualitative Materials*, London: Sage Publications.
- Subrahmanian R (2005) 'Gender equality in education: Definitions and measurements', in *International Journal of Educational Development*, 25,(4):395 – 407.
- Swidler A & Watkins SC (2006) *Ties of Dependence: AIDS and Transactional Sex in Rural Malawi*. Los Angeles: California Center for Population Research, University of California Los Angeles.
- United Nations (2000) 'The UN millennium development goals'. Available from <http://www.un.org/millenniumgoals/> (Retrieved 8 May 2006).
- Unterhalter E, North A, Karlsson J, Onsongo J, & Makinda H (2009) 'Four forms of disconnection: Negotiating gender, education and poverty reduction in schools in Kenya and South Africa', Unpublished.

DR JENNI KARLSSON is a senior lecturer in the faculty of education at the University of KwaZulu-Natal in Durban, South Africa. She has a professional background in education and librarianship and since 1994 has been researching education policy in the schooling sector in South Africa. In 2003 she received a doctorate from the University of London for her visual study of apartheid and post-apartheid discourses in school space. E-mail: Karlsson@ukzn.ac.za

